

2019 ESSENTIAL FACTS

About the Computer and Video Game Industry

DEFENDANT

United States District Court
Northern District of California

Case No. **4:20-cv-05640-YGR**

Case Title *Epic Games, Inc. v. Apple, Inc.*

Exhibit No. **DX-4217**

Date Entered

Susan Y. Soong, Clerk

By: _____, Deputy Clerk



entertainment[®]
software
association

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The Entertainment Software Association (ESA) released *2019 Essential Facts About the Computer and Video Game Industry* in May, 2019. Ipsos conducted the annual research for the ESA. The study is the most in-depth and targeted survey of its kind, gathering data from more than 4,000 Americans about their video game playing habits and attitudes. The *2019 Essential Facts* also includes data provided by the Entertainment Software Rating Board (ESRB) and The NPD Group.



FOREWORD

2018 was a record-breaking year for our industry, with total video game sales exceeding \$43.4 billion. Over 164 million adults in the United States play video games, and three-quarters of all Americans have at least one gamer in their household. It's now more important than ever to understand who America's video game players really are and what's driving them.

That's why I'm thrilled to share the *2019 Essential Facts About the Computer and Video Game Industry*. For the first time, we at the Entertainment Software Association have taken a comprehensive look at the individual Americans who enjoy video games and their lifestyles in order to better understand their profiles and interests.

The resulting data speaks for itself. Video game players represent a diverse cross-section of the American population spanning every age, gender, and ethnicity. They live healthy lives, are civically engaged, and are socially active. More than three-quarters report that video games provide them with mental stimulation (79%) as well as relaxation and stress relief (78%). The role of video games in the American family is also changing: nearly three-quarters (74%) of parents believe video games can be educational for their children, and more than half (57%) enjoy playing games with their child at least weekly.

The *2019 Essential Facts* simply illustrates what we in the industry already know to be true: we are living in the golden age of video games, and video game players are thriving.

– Stan Pierre-Louis, Chief Executive Officer, Entertainment Software Association



65%
of American adults
play video games

The average age
of a gamer is

33 years
old

AT-A-GLANCE



90%

of parents **pay attention** to the games their child plays



59%

of gamers are certain **they will vote** in the next presidential election



75%

of Americans have at least **one gamer in their household**

Gamers are more likely to

have a creative hobby
(drawing, singing, writing, etc.)



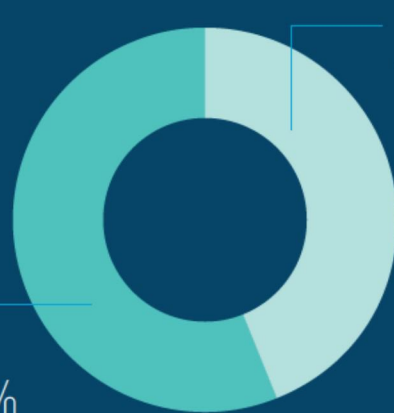
56%
49%

play a musical instrument



32%
27%

Gamers are



46%
female

54%
male

■ Gamers

■ Average Americans

AVERAGE GAMER



65%

of American adults **play video games**

The most common devices used for video game play among adult gamers



60%

Smartphone



52%

Personal computer



49%

Dedicated game console

Most popular game genres



71%

Casual



53%

Action



47%

Shooter



52%

of gamers are college educated

Gamers feel that video game play has a positive impact on their lives



79%

of gamers say games provide mental stimulation



78%

of gamers say games provide relaxation and stress relief



46%

of gamers
are **female**

Average age
for **women**

34



54%

of gamers
are **male**

Average age
for **men**

32

- Overall average age of gamers is **33**
- They have been playing for **14 years** on average



When it comes to adult gamers



63% play with others

Adult gamers spend

4.8

hours a week
played with
others online



3.5

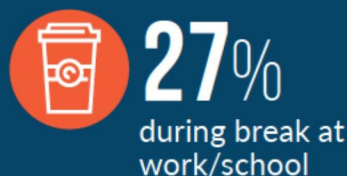
hours a week
played with
others in person



SOCIAL & LIFESTYLE

GAMERS AS COMPARED TO AVERAGE AMERICANS

Gamers play throughout the day



Gamers get the same amount of sleep at night



Gamers are just as likely to

Take camping/hiking trips



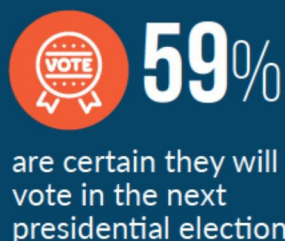
Vacation internationally



Exercise



Gamers are civically engaged



POLITICAL AFFILIATIONS

37% Democrat
33% Republican
18% Independents
12% Other

Gamers are more likely to

have a creative hobby (drawing, singing, writing, etc.)



play a musical instrument



meditate regularly



be vegetarian



■ Gamers ■ Average Americans

PARENTS OF GAMERS



87% of parents are **aware of ESRB ratings**



98% of them are confident that ratings are accurate

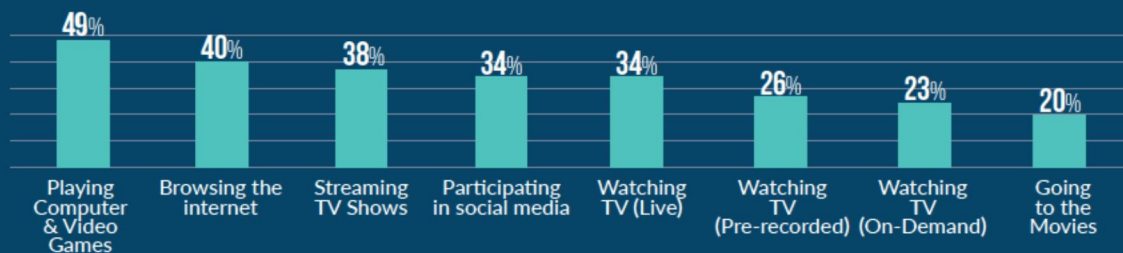


90% of parents **pay attention** to the games their child plays



77% of parents **regularly use** the ESRB ratings

Parents limit the amount of time spent on the following activities



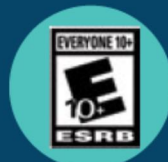
ESRB RATING DATA

Of the 2,768 physical and downloadable console games assigned ratings by the ESRB in 2018:

42%
received



19%
received



30%
received



9%
received



Among parents of gamers



57%

of parents play games with
their child at least weekly



74%

of parents believe **video**
games are educational





of families have a **child**
who plays video games

HOUSEHOLDS WITH CHILDREN

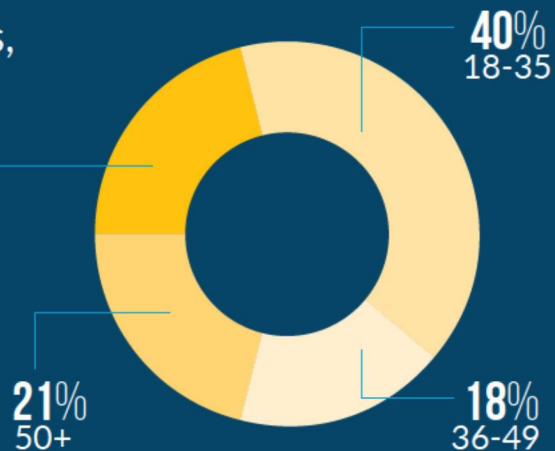


75% of Americans have at least **one gamer in their household**

When it comes to households,



21%
of gamers are
under 18



87% of parents **require permission** for new game purchases



91% of the most frequent purchasers of console, PC, and mobile games in gamer households are **adults**

Average age of most frequent game purchasers for




PC
38



Smartphone
37



Console
33



MILLENNIAL GAMERS (18-34)

Male Millennial Gamers

AGES: 18-34

FAVORITE GENRES:
Action, Shooters & Sports Games

FAVORITE GAMES:
*God of War, Madden NFL and
Fortnite*



Female Millennial Gamers

AGES: 18-34

FAVORITE GENRES:
Casual & Action Games

FAVORITE GAMES:
*Candy Crush, Assassin's Creed,
Tomb Raider*



69%

of male Millennial gamers most often **play games on their game console**



83%

of male Millennial gamers most often **play Action games**



66%

of male Millennial gamers prefer to **play with friends**

FAVORITE GAMES:



61%

Racing games
(e.g., *Need for Speed*,
Mario Kart)



60%

Sport games



59%

First Person Shooters
(e.g., *Call of Duty*,
Battlefield)

59% of male Millennial gamers have a creative hobby
(drawing, painting, singing, writing) outside of video game play

MILLENNIAL GAMERS (18-34)



69%

of female Millennial gamers most often **play games on their Smartphone**



76%

of female Millennial gamers most often **play Casual games**



45%

of female Millennial gamers prefer to **play with friends**

FAVORITE GAMES:



49%

Racing games
(e.g., *Need for Speed*,
Mario Kart)



44%

Puzzle games
(e.g., *Tetris*)



42%

Party games
(e.g., *Super Mario Party*,
Go Vacation)

67% of female Millennial gamers have a creative hobby
(drawing, painting, singing, writing) outside of video game play

A woman with long dark hair, wearing a white t-shirt and blue jeans, is sitting cross-legged on a dark brown leather couch. She is smiling and holding a black video game controller with both hands. The background is a plain, light-colored wall.

GEN X GAMERS (35-54)

Female Gen X Gamers

AGES: 35-54

FAVORITE GENRES:
**Casual Games, including Puzzle
and Classic Arcades**

FAVORITE GAMES:
Tetris & Pac-Man



Male Gen X Gamers

AGES: 35-54

FAVORITE GENRES:
Sports, Racing & Shooters

FAVORITE GAMES:
Forza, NBA 2K, Call of Duty



of female Gen X gamers most often **play games on their Smartphone**



of female Gen X gamers most often **play Casual games**



of female Gen X gamers prefer to **play alone**

FAVORITE GAMES:



62% believe video games
can be **educational**

68% believe they provide
mental stimulation

GEN X GAMERS (35-54)



of male Gen X gamers
most often **play games
on their Smartphone**

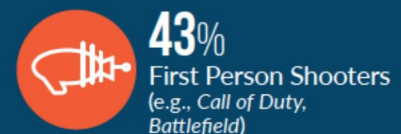


of male Gen X
gamers most often
play Casual games



of male Gen X
gamers prefer to
play with friends

FAVORITE GAMES:



62% believe video games
can be **educational**

68% believe they provide
mental stimulation

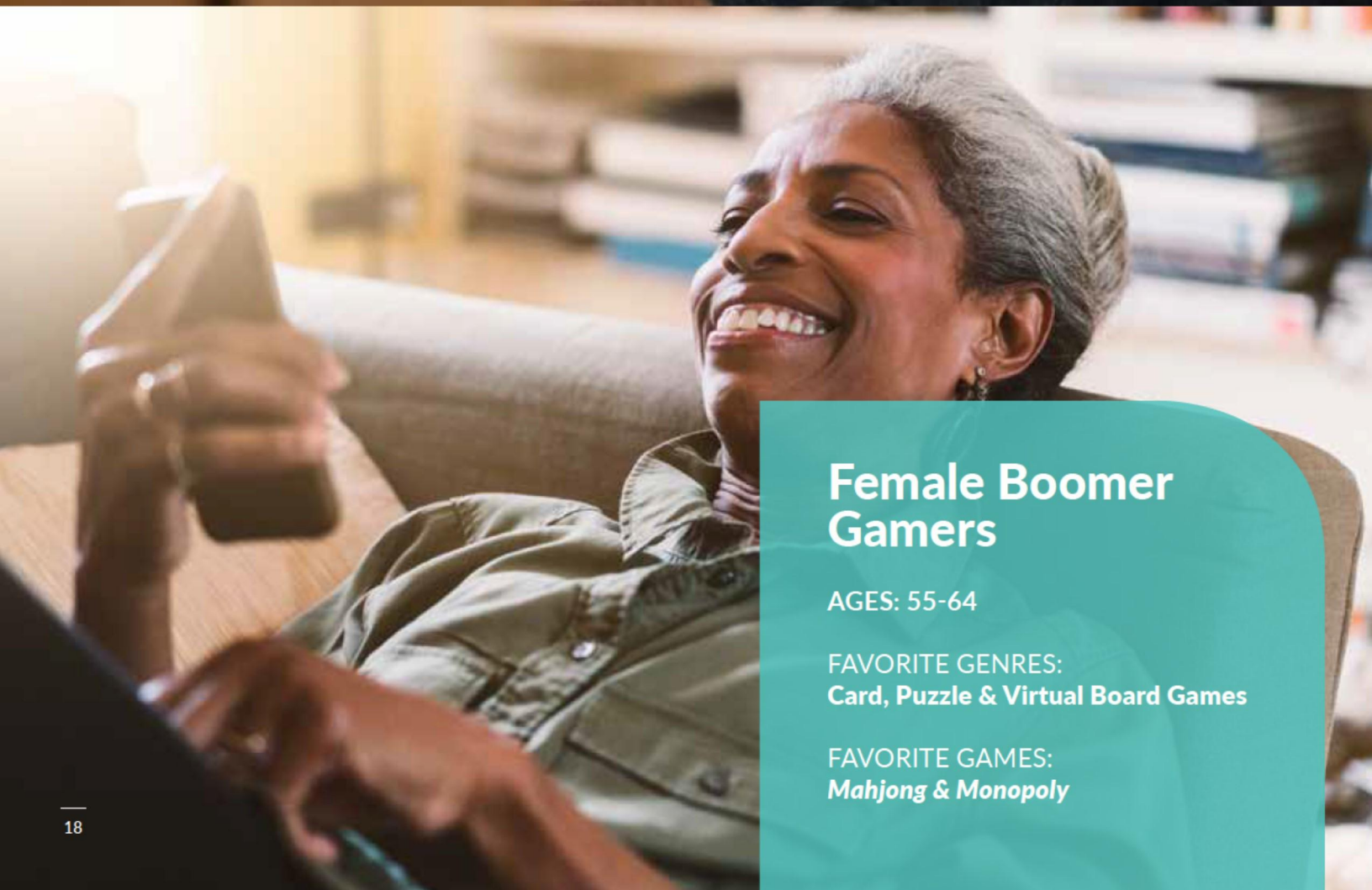
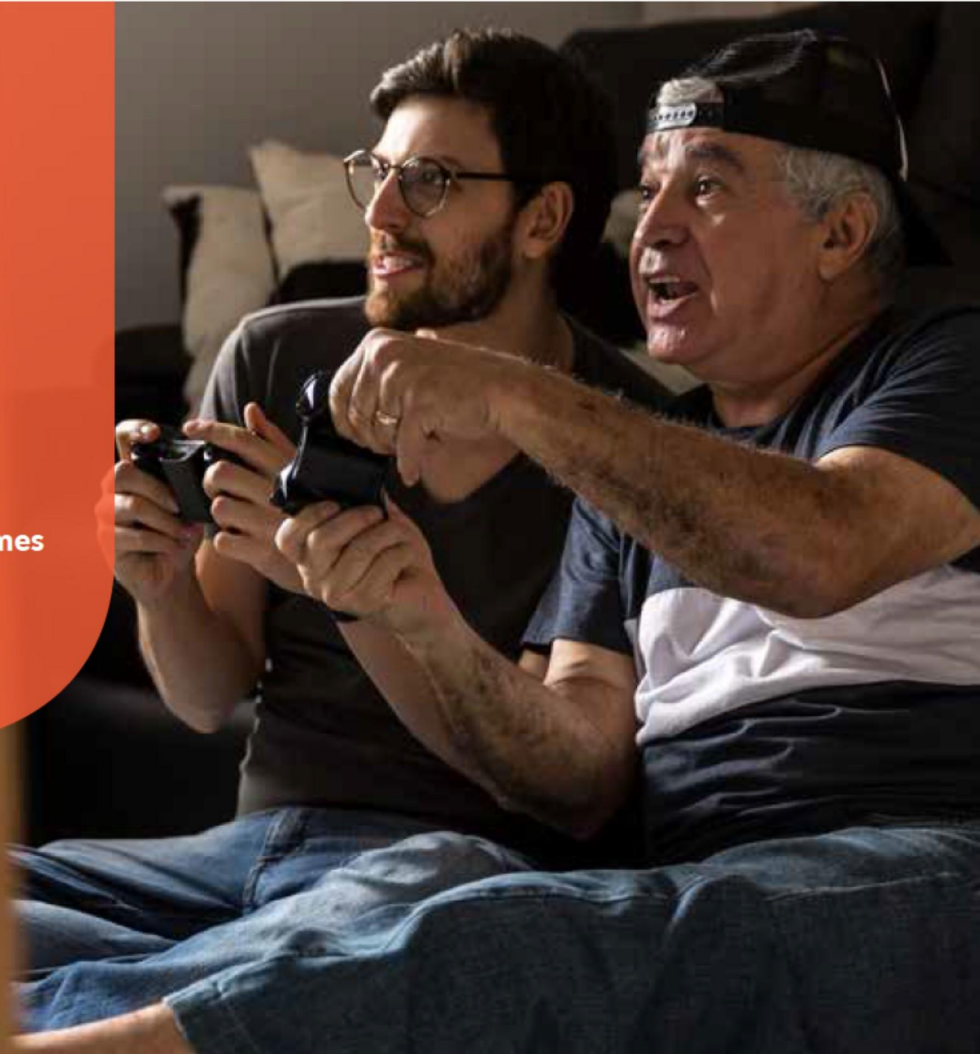
BOOMER GAMERS (55-64)

Male Boomer Gamers

AGES: 55-64

FAVORITE GENRES:
Card, Puzzle and Virtual Board Games

FAVORITE GAMES:
Solitaire & Scrabble



Female Boomer Gamers

AGES: 55-64

FAVORITE GENRES:
Card, Puzzle & Virtual Board Games

FAVORITE GAMES:
Mahjong & Monopoly



66%

of male Boomer gamers most often **play games on their PC**



78%

of male Boomer gamers most often **play Casual games**



65%

of male Boomer gamers prefer to **play alone**

FAVORITE GAMES:



58%

Card/Casino games



35%

Puzzle games (e.g., *Tetris*)



28%

Virtual Board games (e.g., *Scrabble*)

25% of Male Boomers have been video game players for **25+ years**

BOOMER GAMERS (55-64)



58%

of female Boomer gamers most often **play games on their Smartphone**



77%

of female Boomer gamers most often **play Casual games**



58%

of female Boomer gamers prefer to **play alone**

FAVORITE GAMES:



59%

Card/Casino games



45%

Puzzle games (e.g., *Tetris*)



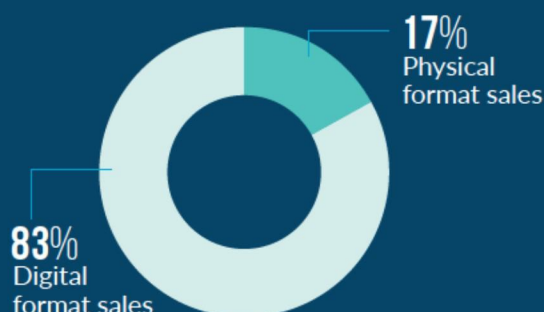
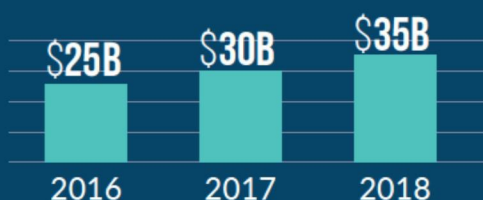
27%

Virtual Board games (e.g., *Scrabble*)

22% of Female Boomers have been video game players for **25+ years**

PURCHASING

Content



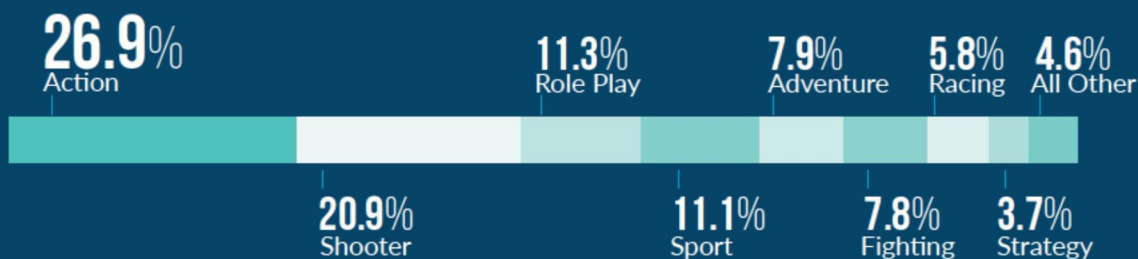
$$\begin{array}{ccccccc} \$35.8\text{B} & + & \$5.1\text{B} & + & \$2.4\text{B} & = & \$43.4 \\ \text{Content} & & \text{Hardware} & & \text{Acc \& VR} & & \text{TOTAL} \end{array}$$

Top 20 Best-Selling Video Games of 2018 by Units Sold

RANK	TITLE	ESRB
1	<i>Call of Duty: Black Ops IIII</i>	Mature (M)
2	<i>Red Dead Redemption II</i>	Mature (M)
3	<i>NBA 2K19</i>	Everyone (E)
4	<i>Madden NFL 19</i>	Everyone (E)
5	<i>Grand Theft Auto V</i>	Mature (M)
6	<i>Super Smash Bros. Ultimate</i>	Everyone 10+ (E10+)
7	<i>Marvel's Spider-Man</i>	Teen (T)
8	<i>Far Cry 5</i>	Mature (M)
9	<i>God of War 2018</i>	Mature (M)
10	<i>Monster Hunter: World</i>	Teen (T)
11	<i>Minecraft</i>	Everyone 10+ (E10+)
12	<i>Tom Clancy's Rainbow Six: Siege</i>	Mature (M)
13	<i>Assassin's Creed: Odyssey</i>	Mature (M)
14	<i>FIFA 19</i>	Everyone (E)
15	<i>Mario Kart 8</i>	Everyone (E)
16	<i>Rocket League</i>	Everyone (E)
17	<i>PlayerUnknown's Battlegrounds</i>	Teen (T)
18	<i>Battlefield V</i>	Mature (M)
19	<i>Call of Duty: WWII</i>	Mature (M)
20	<i>Super Mario Odyssey</i>	Everyone 10+ (E10+)

Source: The NPD Group/Retail Tracking Service/Digital Games Tracking Service

Best Selling Video Game Super Genres



Top 5 influences for purchase



Gamers say the following are useful when deciding on a purchase



ESA PARTNERS

ACADEMY OF INTERACTIVE ARTS & SCIENCES | WWW.INTERACTIVE.ORG

The Academy of Interactive Arts & Sciences (AIAS) was founded in 1996 as a not-for-profit organization dedicated to the advancement and recognition of the interactive arts. The organization has more than 30,000 members consisting of game developers in the United States and around the world. The mission of the AIAS is to promote and advance the worldwide interactive entertainment community; recognize outstanding achievements in the interactive arts and sciences; and host an annual awards show, the D.I.C.E. (Design, Innovate, Communicate, Entertain) Awards, to enhance awareness of the interactive art form. Other special programs and initiatives led by the AIAS also include the prestigious D.I.C.E. Summit and D.I.C.E. Europe, bringing together the top video game designers and developers from around the world and business leaders from all major publishers to discuss the state of the industry, its trends and the future; and Into the Pixel, an exploration and celebration of the art of video games. Please visit our website at: www.interactive.org

INTERNATIONAL GAME DEVELOPERS ASSOCIATION | WWW.IGDA.ORG

The IGDA supports and empowers game developers around the world in achieving fulfilling and sustainable careers through connecting worldwide game developers at all stages of their careers to peers with shared interests and goals, advocating on issues that are important to the professional and personal success of game developers, and providing educational resources for students, game developers, and game development studios that help solve game development's most difficult challenges.

ENTERTAINMENT SOFTWARE RATING BOARD | WWW.ESRB.ORG

The ESRB is a non-profit, self-regulatory body that assigns age and content ratings for video games and mobile apps so parents can make informed choices. It also enforces advertising guidelines adopted by the video game industry and helps companies implement responsible online and mobile privacy practices under its Privacy Certified program.

ESA FOUNDATION | WWW.ESAFoundation.ORG

Created by the American entertainment software industry, the ESA Foundation works to make a positive difference in the lives of America's youth by providing scholarships to the next generation of industry innovators and supporting charitable organizations and schools that leverage entertainment software and technology. The ESA Foundation receives its primary funding proceeds from the signature annual fundraiser Nite to Unite and other charitable initiatives.

THE NPD GROUP, INC. | WWW.NPD.COM

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505 Games

Activision Blizzard, Inc.

BANDAI NAMCO
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Bethesda Softworks, LLC

Bungie, Inc.

Capcom U.S.A., Inc.

Deep Silver

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Electronic Arts, Inc.

Epic Games, Inc.

Focus Home Interactive

Gearbox Publishing, LLC

GungHo Online
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Square Enix, Ltd.

Take-Two Interactive
Software, Inc.

Tencent America

THQ Nordic

Ubisoft, Inc.

Warner Bros. Interactive
Entertainment, Inc.

Wizards of the Coast

XSEED Games

ESA offers a wide range of services to interactive entertainment software companies, including: conducting business and consumer research; providing legal and policy analysis and advocacy on First Amendment, intellectual property, and technology/e-commerce issues; managing a global content protection program; owning and operating E3; and representing video game industry interests before federal and state governments.

To learn more, visit theESA.com, email at info@theESA.com, and follow us on Twitter @theESA.

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